Transitional Housing HMIS Checklist

Note: All Services, Case Notes and Assessments should be completed within the Program Enrollment and NOT at the Profile level for the Client.

1. Enrollment (for all clients who will be sleeping in a bed at the TH project)

- ☐ Verify and update the **Profile** screen of all household members.
  - On right side of Client Profile, ensure all household members should be enrolled in Rapid-Rehousing program
  - Click on "Manage" to update household composition and remove any member who will not be enrolled
    - Click "Edit" next to household members who need to be removed
    - Toggle "Exited Household"
    - Add correct date. If unknown, enter Program Enrollment date

- ☐ Enroll in **Transitional Housing** program.
  - Under *Include group members,* toggle each household member.
  - If a household was enrolled in any other program less than 90 days ago, enrollment data will automatically populate when creating an your program enrollment
    - Work with the client to ensure enrollment data is accurate
  - Project Start Date = date of initial engagement
  - Relationship to Head of Household = select for each household member
  - Prior Living Situation = client provides this information directly; determines chronic homelessness status
  - Disabling Conditions and Barriers = selecting "Yes" for any Condition means "Yes" needs to be selected for "Disabling Condition" field
    - Domestic Violence Victim/Survivor = if "Yes" ensure profile is de-identified (see Your Way Home Operations Manual)
  - Monthly Income and Sources = enter all sources of formal and informal Income amounts
  - Receiving Non-Cash Benefits = Non-Cash Benefits means regular, recurrent benefits; see sources for "Other Non-Cash Benefits"
  - Covered by Health Insurance = if "Yes", make correct selection
    - Frequently selected options
      - Medicaid = federal and state insurance for income-limited households
      - Medicare = federal insurance for adults ages 65+ or under 65 and have a disability, no matter your income
      - State Health Insurance for Adults = Affordable Care Act marketplace

- ☐ Add the appropriate **Services** based on what is provided to the household
  - To add a Services (from Client Profile)

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        - Click Programs; Open Program “Transitional Housing”
        - In Program Enrollment, click on “Provide Services”
        - To expand list, select down arrow on right
        - Select the appropriate Service, fill in appropriate fields & click “Add Service”
    - Service Start Dates should be the same date as the Project Start Date
    - Services must include, at minimum, case management
    - For payment related services (like rental payments): Expense Amount, Expense Date and Funding Source is needed
        - Add payment related services monthly or as funding is distributed

2. Records Management (while client is a project participant)

- ☐ Add case notes to Program Enrollment
    - Case notes should be added after each interaction with a client and outline what was happened during the meeting
    - Remember: Other providers have access to your notes and can see the content of them.
    - Click Programs; Open Program “Transitional Housing”
    - Click on “Notes” from the Program Enrollment
    - Click “ADD NOTE” on the right side of the screen
    - Title= Short summary of meeting content
    - Category = choose the most appropriate category
    - **Note**: data cannot be pulled form notes for future use or analysis. They are only for informational purposes.

- ☐ **Annual Assessments** should be completed within 30 days before or after a client has been enrolled in a program for ONE YEAR
    - Click Programs; Open Program “Transitional Housing”
    - Click on “Assessment” from Program Enrollment
    - Find Annual Assessment at the bottom of the list and click “START”
    - Toggle each Household Member and click “Add Annual Assessment”
    - Update the information on the Assessment as thoroughly as possible
    - **Note**: these data elements are the same as Program Enrollment
        - See Enrollment instructions above for more information
    - Click “Save & Next” to complete the second assessment
    - Complete Annual Assessments for each household member
    - Click “Save & Close” when done
    - **Note**: Clients must be actively enrolled in a program in order to add an Annual Assessment
        - Re-open clients if assessments need to be added after clients are discharge.

3. Project Exit

- ☐ Exit from **Transitional Housing** program when appropriate:

- The household has identified permanent housing- independently or with a rental subsidy
- The household has entered an institutional setting
- The household violated the terms and conditions to remain a resident To Exit from a program-
  - From Client Profile click “Programs”
  - Open Program “Transitional Housing”
  - Click “**Exit”** on the top right of the page.
  - Update the information on the Exit page as thoroughly as possible
  - **Note**: these data elements are the same as Program Enrollment
  - Exit Destinations= Where the household is going now
  - “Staying with Friends/Family- Permanent Tenure”= staying somewhere longer than 7 days
  - Do not answer **“Data Not Collected**.” If unable to follow up with a client, select “**No Exit Interview Completed**” instead
- Modify the end date for all open services (listed at the bottom of Exit screen)